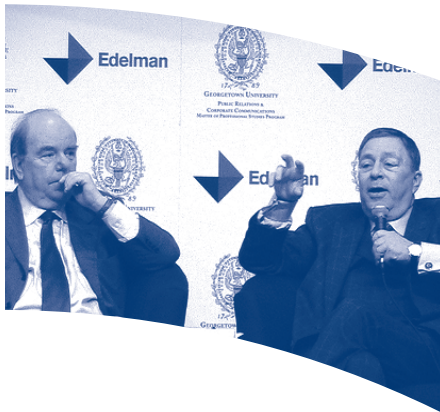


# ENGAGING THE NEW INFLUENCERS

## THIRD ANNUAL NEW MEDIA ACADEMIC SUMMIT

JUNE 9-11, 2009 • GEORGETOWN UNIVERSITY • WASHINGTON, D.C.





## About This Report

Edelman convened more than 100 professors of communications, journalism, business and public relations from across North America and Europe to discuss how companies, organizations and media effectively engage their stakeholders through social media. The sessions were led by more than 50 practitioners who guide digital communications strategies within leading organizations – including AstraZeneca, CNN, eBay, Environmental Defense Fund, GE, Johnson & Johnson, Microsoft, Starbucks, The Lance Armstrong Foundation, UPS, and Whirlpool, among others.

This report provides best practices and actionable insights into how to engage employees, consumers, investors, regulators and media.

For more information on the event, including webcasts of the panel sessions, visit [www.newmediaacademicsummit.com/Summit09/agenda.asp](http://www.newmediaacademicsummit.com/Summit09/agenda.asp).

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**Richard Edelman**  
President and  
CEO, Edelman

## From PR to Public Engagement

Media is changing profoundly. There is a shrinking news hole as reporters are laid off because of the decline in ad revenues. Media is incorporating reader feedback and discussion, short-form video, and news aggregation.

There is a dispersion of authority as people get news from multiple sources. The reliance on mainstream media or traditional influencers is shifting towards people with experience, passion and voice earned by knowledge or frequency of their posts. Consumers are moving away from instant gratification toward instant justification – from what they want, to what they need.

In this new world of expression, public relations practitioners either evolve or die. We must shift our thinking and move from pitching to informing, from control to credibility, and from influencing elites to engaging the new influencers.

Most of all, we must build trust through continuous conversation and relevant actions. This is public engagement – the combination of policy and communications which enables corporations and organizations to engage credibly in a stakeholder world. Therefore, PR must advise organizations on policy, offering views on all important decisions a corporation makes. Benefiting shareholders is no longer enough – companies must create value for all stakeholders. We are in a unique position to offer valuable insight because we are engaged with today's newly empowered constituencies.

By fully integrating public engagement strategies, public relations can become the communications partner of choice in the coming decade – if we seize the mantle today.

### Tenets of public engagement

To engage successfully, we need to do the following:

- **Integrate search into PR.** Our work must be crafted for reputational search and social search (Google increasingly ranks social content from Flickr, blogs, Twitter, etc.). We should prioritize media and blogger outreach on the basis of which outlet helps most in search. We can also create “embassies” for clients within social networks like Facebook and Twitter so that there is an outlet for suggestions and complaints.
- **Mobilize the influencers.** We have always engaged credible experts to provide independent insights for mainstream media. Today, we seek to uncover influ-

encers of all stripes – people who are passionate about a specific topic – and provide them with early access so they can publicly discuss product or corporate initiatives.

- **Inform the conversation.** We can no longer rely on readers to go to mainstream media or to a client's Web site. We need to go where people are – whether in social media or blog post comments (with transparency about our client's interest). We must also provide people with relevant utilities, whether through the Web, iPhone or Pre apps.
- **Understand that every company is a media company.** Companies can offer a real depth of content from their core knowledge area. A good example is Johnson & Johnson's Baby Center, the Web's number one global interactive parenting network. Clients can engage their consumers and curate conversations happening around the Web on a given topic.
- **Be present and consistent.** The average person uses eight sources of media each day. That same person needs to hear or see something three-to-five times to believe it. So we need to involve audiences consistently across all media, adapting the discussion and style to the specific medium. For instance, the Butterball Turkey Talkline offers mobile texting tips, hosted Web chats, a partnership with Bravo's Top Chef, and a Cellufun mobile game.
- **Act in a democratic and decentralized way.** In the world of social media, it's critical to give a voice to the people. The Ben & Jerry's Facebook page has nearly 1 million fans who can create their own flavors, take interactive polls, give virtual gifts, and connect via Twitter.

(Disclosure: Palm, Johnson & Johnson, Butterball, and Ben & Jerry's are clients.)

### Key takeaways:

- **It's no longer a shareholder world; it's a stakeholder world. Companies must create value that extends beyond earnings.**
- **What you say and what you do must align. PR must advise companies to bring talk and action in synch.**
- **Go where people are; don't expect them to come to you.**



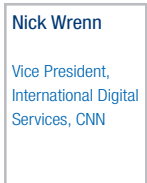
**Dan Gillmor**

Director,  
Knight Center  
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Entrepreneurship  
and Kauffman  
Professor of Digital  
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**David Kirkpatrick**

Senior Editor,  
Fortune



**Nick Wrenn**

Vice President,  
International Digital  
Services, CNN



**Jim VandeHei**

Executive Editor and  
Co-founder, Politico



**Shelby Coffey**

**Moderator**

Senior Fellow &  
Trustee, Newseum

## The State of Media: Today and Tomorrow

### Media is reinventing itself

In the social media world, news travels far and fast.

Case in point: the Mumbai terrorist attacks. This incident showed how social networking can be a vital newsgathering tool. At one stage, CNN saw five Twitter posts every second. Reports on the coverage showed that the e-mails, cell phones and observer filings gave a much better picture of what happened on the ground than expected. But the challenge remains how to separate the wheat from the chaff.

Nick Wrenn of CNN said that journalists must make sense of all the “noise” to make sure that accuracy isn’t sacrificed for speed. Media who want to be relevant in a Twitter age will need to remodel themselves and see social media as a complement to their media coverage, not as a threat.

According to David Kirkpatrick, who is writing a book on the social media giant, Facebook is becoming an influential platform for consumers as well as media. In fact, Nielsen data showed that time spent on Facebook increased 700 percent in the U.S. between April 2008 and April 2009, and that every three of 10 people on the Internet in the world are using Facebook.

### Academia must keep up with the pace of change

Social media is calling for a more active user community of media, which, according to Arizona State’s Dan Gillmor, presents an opportunity for academia. One option is making social media training integral to the curricula in academia, not just in journalism, PR, advertising and communications programs, but university-wide.

Jim VandeHei of Politico also encouraged media companies “to keep experimenting” with new tools of audience engagement, and universities to keep up with the tools, which will keep changing. Despite challenges facing media today, the panel agreed that this is an exciting time to enter the journalism field and that young people who want to be journalists will most likely still have ample opportunities.

“We don’t know all the best models yet. People who are young, who have less to lose – I’m jealous of my students for that – they get to be the ones to reinvent what we will have...I’m interested in celebrating that there’s an enormous amount of experimentation going on in content ideas. This means we’re going to have plenty of good journalism in the future. The difficulty will be sorting the trustworthy from the untrustworthy journalism.”

– Dan Gillmor

### Key takeaways:

- **With the rise of social media and a major shift in media habits, traditional journalism has changed forever. Social media puts the burden on media companies to keep experimenting – while not sacrificing accuracy for speed – and on universities to keep up with new tools.**
- **An enormous amount of experimentation is taking place and will lead to new, profitable business models and no shortage of good journalism in the future.**
- **The digital era demands more active media users, which presents an opportunity for academia to integrate social media more into its curricula.**



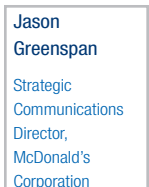
**Jack Bergen**

Vice President,  
Communications,  
Alcoa, Inc.



**Susan Bishop**

Director, Employee  
Communications,  
General Electric



**Jason  
Greenspan**

Strategic  
Communications  
Director,  
McDonald's  
Corporation



**Gary Grates**

**Moderator**

President  
and Global Managing  
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and Employee  
Engagement,  
Edelman

## Employee Engagement: Encouraging New Conversations

Corporations can no longer dictate messages. Social media makes information ubiquitous, and organizations must engage in new conversations and discussions that offer greater context and rationale.

From an internal standpoint, openness and authenticity are expected, especially given the lack of trust and leadership credibility now plaguing global organizations. No longer do employees trust what the CEO says, rather they are more likely to trust their peers, according to Edelman's annual Trust Barometer. In this distrustful environment, employers are facing a reticent workforce – even from recent graduates.

This panel focused on ways companies leverage new media to engage employees, through knowledge-sharing, storytelling or connecting on a network to increase a sense of community. While the three organizations represented on the panel were from different industries and have completely different businesses, all three found themselves in a similar place in this new communications environment.

## Engaging employees: Real-world examples

McDonald's uses the portal "Station M" to connect with its employees and create brand ambassadors. The site offers interactive tools, including a blog with 15 writers, games and the ability to post photographs. According to the company's strategic communications director Jason Greenspan, 70 percent of employees who use Station M said it makes them feel like they matter to the company. In return, McDonald's has gained valuable insight that is helping the company make decisions.

General Electric focuses on engagement, conversation and creating community. Among GE's impressive new media tools is "GE Connect," a knowledge-sharing Web site that unites people within the organization with thousands of blogs and wikis.

Alcoa, Inc. entered the social media realm when, for budgetary reasons, the company chose to conduct a meeting via Webinar. The result was a much richer discussion that has led to continuous dialogue among the top leaders of the company. Now, Alcoa uses webcasts called

"Leadership Dialogues Online" as a regular medium to engage leaders and managers throughout the company. Employees at all levels are encouraged to record video messages with Flip cameras so leaders can respond to questions or concerns. The format is transforming the culture of the company, and employees from all businesses within the organization are more confident in Alcoa.

Finally, social media is enabling companies to have access to more information from employees than ever before. These new methods of dialogue inform decision-making and maintain a pulse on the culture, while giving employees a voice.

**"You have to get to the leaders first, empower them, challenge them... show them that dialogue works, then create a (new media) mechanism that works."**

– Jack Bergen

## Key takeaways:

- Organizations must engage in new conversations and discussions that offer greater context and rationale.
- Social media has changed workplace mores – creating more discussion, dialogue and debate. CEOs do not have the last word.
- Openness and authenticity are required, given the lack of trust and leadership credibility.
- Social media increases organizational IQ and with it – trust, believability, effectiveness and efficiency.
- Organizations can leverage social media to engage employees on any initiative, whether through knowledge-sharing, storytelling or connecting on a network to increase involvement and forge a sense of community.



**Mike Slaby**

Chief Technology Strategist, Tomorrow Ventures; formerly Chief Technology Officer, Obama for America; Technology Director, Presidential Transition Team



**Debbie Curtis-Magley**

Public Relations Manager, UPS



**David Liu**

SVP/GM, People Networks, AOL



**Nancy Ruscheinski**

**Moderator**

President and COO, Edelman U.S.; Chairman, Edelman Digital

## Advancing Reputation: Every Organization is a Media Company

When Andy Heyward, the former CEO of CBS, said that “every company is a media company,” he was acknowledging a seismic change in the business and communications worlds. Companies no longer have to filter their content and messages through the media; they have the means to create and distribute their own content – and potentially to advance their own reputations – through the channels they choose. By this token, every company today is arguably a social media company, too.

As companies venture onto the social media stage, there are a few best practices this panel suggested.

- **You don’t have to be everywhere.** Every company doesn’t need to be involved in every social network. Do what makes sense for your company, and don’t go somewhere just because your competitors have a presence there. Know the culture and subcultures within each social media network and recognize that it is not necessary to be in every conversation – just the ones where you can add value.

As a presidential candidate, Barack Obama was able to harness the full power of social media because he had a big and charismatic personality and was an enthusiastic participant. If your organization doesn’t have a personality, and/or can’t sustain an active relationship in social networks, it shouldn’t be there.

- **Don’t forget the “social.”** Organizations need to remember that going into these private spaces online (and social networks are indeed private spaces), they are equal members with everyone else in the network. Companies and brands are not broadcasters, and can’t set up a profile and walk away. It won’t advance reputation – in fact, it may well harm it. Approach the social media space like a real relationship, and be ready to do the hard work that goes into any good relationship.
- **Be willing to give up control.** One of the hallmarks of the Obama campaign was the willingness to give out logos, digital kits, and tools to give up a sense of ownership. When American voters felt that they had shared ownership of the campaign – and shared responsibility for its success – it made a profound difference to the outcome.

So why would a company want to engage in social media? Participation can help companies extend the reach of their campaigns and initiatives, and can even add a new dimension to customer service. It can provide a fresh platform for launching new products, and for engaging employees in new ways.

Finally, remember that it’s not the online metric that matters most. Understand how the online behaviors are triggering offline actions – that’s the real opportunity of social media.

**“The gift of social media is that it’s all about telling your own story, which is an intensely personal thing. People miss the opportunity with social media when they treat it like a broadcast channel.”**

– Mike Slaby

### Key takeaways:

- **Don’t be somewhere you shouldn’t be – your organization’s social media presence should be authentic.**
- **Treat social media like a relationship – be prepared to work at it, and be willing to give up control.**
- **Always connect what you do online to offline actions.**



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Wheeler

Director of Digital  
Strategy, Starbucks



Richard  
Brewer-Hay

Chief Blogger, eBay



Aaron Lilly

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Manager, Microsoft



Greg Matthews

Director of Consumer  
Innovation, Humana



Rick Murray

**Moderator**

President,  
Edelman Digital

## Crowdsurfing: Engaging Consumers

In their book “Crowdsurfing,” Martin Thomas and David Brain (CEO, Edelman EMEA) argue that “whether buying a book, a holiday, or a new car, the opinions of our fellow consumers appear to carry as much, if not more, weight than those of the established order.”

Empowered consumers are the new world order in business. For marketers and communicators everywhere, the implications of this shift in the balance of power are just beginning to sink in. Here are some of the things we’re learning.

- **The lines between corporate communications and brand marketing are invisible to consumers.** Businesses tend to see things in tidy silos; consumers don’t. Companies are now being held publicly accountable for everything anyone does at any point in the consumer’s overall experience with the brand. Any mistake can show up as a rant on Twitter.
- **Listen up.** Paying attention to what people are saying, where they’re saying it and who they’re saying it to is a must. On the plus side, this will help identify loyal fans and what’s important to them. From an insurance perspective, it will alert you to potential issues at the same time as the rest of the online world, which includes most journalists, financial analysts and an increasing number of regulators.
- **People want to engage with people.** Empowering individuals to speak about a brand or company in their terms, and on their turfs, is terrifying. Consumers find the alternative – messages that are scripted, laden with jargon or sanitized by lawyers – equally terrifying. Every brand has a personality and set of core values. Give yours a face, a voice and a name. Consumers will thank you for it.
- **Trust and credibility can’t be assumed.** Trust is earned one day at a time by listening attentively, responding quickly, saying what you do and doing what you say. Don’t jump into your online engagement efforts with a “we’re here” pronouncement. A much better approach would be to compliment or complement something someone else has said or done first – without expecting anything in return.

- **It’s a marathon, not a sprint.** Promotions and news stories create temporary spikes in awareness. If we don’t give consumers reasons to engage with us and other consumers in between the spikes, we’re leaving our most valued relationships vulnerable to competitive spending.
- **Content is king.** Staying relevant to your consumers is a 24/7 challenge. Showing the same ad or message over and over won’t make you relevant; engaging with consumers regularly will. The conversation doesn’t have to be about you (and probably shouldn’t be). It simply needs to be about something on which you have a point of view and about which your consumers care.
- **Where social media has gone, mobile is headed.** Increased penetration of GPS-enabled smart phones will make location-based targeting a must in the very near-term. We have to find ways to make ourselves relevant to individual consumers at precise points of need and opportunity.

“I’m like a bartender, but I serve information instead of beer. There are a lot of places people can go to get that information, but if they like what I have to say and the way I say it, they’ll feel welcome, come back often and tell their friends about me.”

– Richard Brewer Hay

### Key takeaways:

- Empowered consumers are the new world order of business.
- To remain relevant, companies must engage with consumers frequently – and let consumers engage with them in their terms, and on their turf.
- Humanize your brand.



**Bob Shrum**  
Political  
Consultant (D)



**Tony Blankley**  
Political  
Consultant (R)



**Rob Rehg**  
Moderator  
President, Edelman  
Washington, D.C.

## The New Era in D.C.: A Discussion with Bob Shrum (D) and Tony Blankley (R)

Tony Blankley and Bob Shrum discussed the evolution of new media's role in political campaigns, the potential for digital communication to become a tool for persuasion and politics in Washington, and the changing political landscape in D.C.

### Digital's evolving role

Shrum asserted that the real revolution in digital began during the 2004 presidential elections when we saw a "democratization of fundraising through the Internet." In 2008, the Obama campaign went a step further by using the Internet to raise funds and mobilize voters. Now, companies, trade associations and organizations are following suit; even political movements are all being organized on the Internet. Looking ahead, digital media will transition from a communications tool to a persuasion tool.

### Presidential communication

The panelists disagreed on whether — with the many digital and traditional media tools available to use — President Obama is overexposed as a communicator. Shrum said that "Obama has defied the old, conventional warnings about overexposure. The world has changed and people want the immediacy of their leaders. Obama has sensed that...and as a result, he's out there all the time." However, Blankley cautioned that using the president as the spokesperson on every issue is "an experiment that we don't know the result of" and stressed the importance of having a deep well of communicators from which to draw.

### A new political era?

We may also be seeing two simultaneous revolutions — one in communications and one in politics. The new era of communications has already begun; what we won't know until at least a few more years is whether we are at the beginning of a new era of American politics. Blankley noted that if we are embarking on a new era, it will not be based on demographics and "shifts from right to left," but whether the public can be convinced of a "new and better way to deal with our problems."

"The Internet is going to weaken parties in the same way that television weakened parties in the earlier years. . . Now that Obama has shown how you can organize in the real world through digital communication, the function that a party provides, which is to organize and get votes out, is reduced in value. We'll see more entrepreneurs in politics, less connected to their parties."

— Tony Blankley

"The digital revolution is one of the most interesting developments I've seen in the very long time I've been in politics. It is more democratizing than any other tool in the world because in some ways, it's absolutely uncontrollable, and in other ways, it gives you more power to direct events than anything else we have."

— Bob Shrum

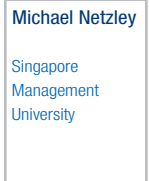
### Key takeaways:

- Digital will continue to dominate the way we communicate; mass communication of the 21st century will look archaic 10 to 15 years from now.
- Digital communication — Facebook, Twitter, YouTube — has reduced the amount of time that it takes to mount an opposition campaign. However, on larger issues (e.g., healthcare reform) a truly effective opposition campaign is still more involved and multifaceted.
- The term "new media" is obsolete; digital communication is well-established and here to stay.



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Director, Digital  
Strategy, Edelman  
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**Michael Netzley**

Singapore  
Management  
University



**Wolfgang  
Lünenbürger-  
Reidenbach**

Head of Social  
Media Europe,  
Edelman



**Michael Morley**

**Moderator**

Senior Counsel,  
Edelman

## Global Perspectives

Across the globe, it's clear that the economic climate is driving interest in digital communications. As businesses review what's working and what isn't in challenging economic times, many are discovering that their big advertising spends no longer bring the returns that they once could expect. As a result, more companies are building relationships with key stakeholders through social media. But social media initiatives are still considered a "bolt-on" to a traditional marketing/communications strategy, rather than "baked in."

### Global platforms, local discussions

Last year, panelists discussed how each market had its own social networking leader. A year later, Facebook has demonstrated massive growth and appeal across western Europe, and it has become a leader in every market it has entered. This suggests that truly global social media platforms are possible — an idea confirmed by the significance of Twitter in the post-election demonstrations in Iran. But although the communications platform might be global, the traffic on Facebook and Twitter takes place primarily in the local language — or languages — of the various countries.

This indicates that to be effective, social media engagement today must still take place in local languages, and take into account local cultures and customs. There is even likely to be a trend towards hyper-localization. Recent European Parliament elections illustrated that local interest trumps transnational issues — as there was virtually no public discussion in social media about transnational issues, but there was extensive and lively debate on local topics.

Localization is as important in Asia as in Europe. The region has 4 billion people and 2,000 languages; most dialogue online is in the local language. The region differs from the U.S. and Europe in that mobile devices rule, which should be taken into account when formulating strategies. One out of three people access the Internet by mobile phone or laptop, and it is predicted this number will grow.

The importance of local over global engagement on social media is likely to continue over the next few years — at least until the accuracy of automatic translation technology improves.

Finally, with regard to policy and control of the Internet, China's strong central government is driven by its goal of maintaining "social harmony," and will adopt policies of control to achieve that aim. However, with consumers all around the world demonstrating an ingenuity to circumvent blocking devices, we can only speculate the amount of control that will be possible.

### Key takeaways:

- Although global platforms like Facebook and Twitter are growing at a remarkable rate around the world, conversations are in local languages and about local issues.
- In Asia, one in three people access the Internet by mobile devices.
- There is a battle between governments that want to control Internet access and content and those who want unfettered access. They play an incessant game of technological leapfrog.

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## Health: Using New Media in a Regulated Industry

The health sector is no stranger to the digital revolution. An estimated 115 million to 120 million people are looking online for health information, and 60 percent of them change their approach to dealing with their health based on information they learn online. This has companies and organizations such as AstraZeneca, Johnson & Johnson and the Consumer Healthcare Products Association (CHPA) looking for ways to meet this online demand, while also keeping legal and regulatory guidelines in mind.

Consumers looking for information online often seek information from “people like themselves” because they may see peers as more trustworthy than business or even government sources. But the risk is that health information from someone other than a medical professional could be inaccurate or misleading. As such, many in the industry see a real opportunity to provide content to consumers. But engaging online for the pharmaceutical industry is not without its challenges.

The U.S. Food and Drug Administration is working to overhaul its direct-to-consumer communication guidelines, which were written with consumer advertising in mind rather than social media. But until more evolved regulations are in place, industry must determine how to engage online in a way that takes privacy and potential liability into consideration.

### Healthy social media participation

Regulation should not keep industry from participating, said AstraZeneca’s Earl Whipple. “The questions need to be, ‘What are we jeopardizing by not engaging in this space?’ and ‘How might patient health be at risk from the proliferation of inaccurate or misleading information?’”

Johnson & Johnson’s Marc Monseau elaborated: “This has created a mandate for us...to figure out a way to get online at the very least to correct any misinformation. Beyond that, we are companies that have deep information about specific disease states, and we are companies of relationships. We have this opportunity to tap into the information that we have and provide it to people who are looking for health information online.”

CHPA’s Five Moms campaign is an example of successful online engagement in the health space. It features a group of everyday moms who communicate with an online community of more than 1.8 million people about the dangers of cough medicine abuse. CHPA’s Virginia Cox

said her organization learned important lessons along the way. For example, maintaining a high level of transparency with online audiences is critical to authenticity, yet doing so means giving control of the community to the forum (moms in this case), thus opening the gate to potential criticism. CHPA embraced its role as a participant in the conversation as opposed to the director of it, resulting in a highly successful online community.

There is much work to be done before the health industry finds its “groove” in engaging with key audiences online, but that won’t keep them from trying.

“People are turning to information from people like themselves because they don’t trust information from people like us [the pharmaceutical industry]. If anything, the ability to start to provide useful information can really help to build that trust within the organization and provide the health information people need to make important decisions.”

— Marc Monseau

### Key takeaways:

- **There is a need for credible, authentic, trustworthy health information online. In the absence of credible information, people will settle for what they trust – and this may not always be accurate.**
- **Industry has a role to play to build real relationships with consumers, provide information that is both credible and trustworthy, learn about consumers’ needs, and then help to educate regulators about the information needs of consumers.**



**Clay Johnson**

Director, Sunlight Labs (Sunlight Foundation); formerly Co-Founder, Blue State Digital



**David Almacy**

Senior Vice President, Digital Public Affairs, Edelman, formerly Director Internet Operations, The White House



**Mike Krempasky**

**Moderator**

Executive Vice President, Digital Public Affairs, Edelman

## Insights from the U.S. Administration About Engagement

The online landscape in the political arena has changed significantly since John McCain was the first to raise \$1 million online in 2000. Since then, political blogs have become even more popular, and YouTube, Twitter and Facebook have affected a presidential election. Clearly, engagement through social media has become an important part of campaigning in light of President Obama's success using online channels on the campaign trail. Social media also is a key fundraising vehicle – in fact, President Obama raised approximately 80 percent of his campaign contributions through direct e-mail. Clay Johnson forecast that Twitter may be the driving fundraising tool in the next national election, as large follower lists could replace dormant e-mail databases – especially since link tracking tools like bit.ly provide valuable data for campaign organizers.

### The role of social media in governing

David Almacy said that the job of government Web sites is to create content and allow people to interact with it, and that the best thing government Web properties can do is provide resources that are sharable and exportable to places where larger communities can discuss them. One example cited was how Google and other citizens took RSS feeds from WhiteHouse.gov and published them on other channels. This broke down previous barriers that surrounded government communication and gave citizens the opportunity to leverage the data in ways they found useful.

Data is becoming even more flexible under the new administration, specifically around Data.gov, a site that works to make as much government information available as possible. Johnson noted that government must continue to do more than just make this data accessible; it must produce it in simple formats and publish it quickly to make it usable. In response to a question from a journalism professor, Johnson asserted that it is time for people to stop trying to argue that they are not “computer people.” Understanding databases and how to analyze data will become a valuable asset for any journalist or citizen moving forward.

Mike Krempasky predicted that government is only going to become more open and transparent. The U.S. legislature and executive offices are technologically advanced, compared to its global peers. The future is certain to bring less control for government and corporations, which will require even greater commitment from those who spend their careers watching the actions of the political machine.

**“Consensus is the enemy of innovation.... I’m willing to say it here and then say I’m wrong four years from now, but I think in 2012, Twitter will be a bigger fundraiser for a presidential campaign than e-mail.”**

– Clay Johnson

### Key takeaways:

- **Social media engagement is a critical part of campaigning, and in the future, Twitter may be a leading fundraising channel.**
- **The job of government Web sites is to create content and allow people to interact with it.**
- **Understanding databases and analyzing data will become a valuable asset for any journalist or citizen moving forward.**



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Washington, D.C.

## NGOs: Advancing Issues

According to Edelman's 2009 Trust Barometer, NGOs are the most trusted institution globally – more so than business, media and government. This panel discussed what NGOs are doing to build relationships with and engage stakeholders through social media.

### NGOs and social media: A snapshot

- **Relinquishing message control:** The most challenging task for nonprofits is learning to let go of message control. But this is essential to shift from one-way communications to open dialogue about a cause. The Environmental Defense Fund (EDF) is one organization that is taking steps to release some control of its established brand – including having its president tweet. The organization is positioned well online – it is accessible and consistently active on most online networks, and has gained modest success in membership. However, what is most beneficial to the organization is seeing how conversations among thought leaders spill over into the new media space, creating an echoing impact.
- **Embracing the social media era:** Newer NGOs embrace social media from day one. This is the case with 1Well, which mobilizes social networks to help accomplish its international development projects. It identifies partners in high-need communities for “social venture capitalists” to engage directly in projects in which they believe.
- **Engaging – not e-mailing – constituents:** The marketing success of nonprofits typically has been gauged by the size of its e-mail databases. Today, it is no longer about the numbers but the core audience a group can empower. The Lance Armstrong Foundation has adapted to these changes, allowing the organization to find alternate ways to create a valuable campaign without wasting money and effort. For example, the Foundation's new media director held a tutorial session to show its followers how to use Twitter to supplement the cause of the Foundation.

## Lessons for academia

Academic curricula should incorporate what the most appropriate social media tools to use are for specific tasks. Some situations would benefit from a Twitter campaign, while others require a dedicated blog. It is important for communicators in this new era to understand the differences and learn how to apply these tools. Succeeding in the social media realm will require not only technical skills but also a deep passion for the mission and an understanding of how traditional marketing vehicles can foster dialogue and drive action.

**“Social media is not always an obvious fit for us...letting go of control is not something that comes easily.”**

– Kira Marchanese

**“We're building a platform that will empower people to leverage new media tools to take our message out there...and then, engage in a dialogue with their social network and start that conversation and drive them to action.”**

– Dan Morrison

### Key takeaways:

- **NGOs must learn to release control of their messages and allow for free dialogue.**
- **Social media allows organizations to be transparent and see immediate results.**
- **In the nonprofit space, it is no longer about how many people the company has access to, but more about how many people it can empower to support its cause.**



**Brian Snyder**

Senior Manager,  
Interactive  
Communications  
and Knowledge  
Management,  
Whirlpool



**Lee Aase**

Manager, Syndication  
and Social Media,  
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**Marcel Lebrun**

CEO, Radian6



**Natasha Fogel**

**Moderator**

Executive Vice  
President,  
Global Analytics  
and Measurement,  
StrategyOne

## Measuring the Impact of Social Media

Social media measurement helps validate and communicate the value of digital initiatives, inform strategy, and identify areas of opportunity for issues, engagement and other outreach. But there are numerous challenges when measuring social media:

- We have to first educate people about social media, and how influential it is.
- Social media has disrupted conversation on multipurpose mediums, making it difficult to track everything that moves. Media is no longer a one-way street.
- Measurement logistics have changed.

### Common metrics

Social media is continually evolving. This dramatic growth forces measurement to develop at a similar pace. Widely accepted, straightforward measurement programs consist of metrics such as the number of clicks or hits on a site, site purchases or time spent on a site. These metrics measure the effects of engagement and in some cases, sales. For example, when measuring the success of its Habitat for Humanity program, Whirlpool Corp. cited results that included an increase in Facebook page views by 24 percent, and a top-rated video on Yahoo! Live.

Other core social media metrics can include:

- Identification of areas of interest with recorded actions
- Comments/links/bookmarks/votes/likes
- Identification of where your influencers are
- Share of conversation, the social media share of voice
- Sentiment

Influencers are a main topic of discussion in the digital media sphere. While there is no best practice or consistent way to measure influencers, there are many variables that are relevant and important. We measure details including: How often does the influencer post? Who comments about what he or she posts? Who replies? What are they saying? What are they linked to (inbound links)? Who is in their network? These metrics are evolving along with social media itself, so it is not expected that the industry will embrace a consistent form of measurement for some time.

Most importantly, we encourage businesses not to be tempted by the glossy tools that are flooding the market place. Rather, they should first clearly define their goals for engaging in a social media program and desired ROI. To measure these programs, employees can be tapped to help. Employees want to be engaged as ambassadors. With proper training in ethics, standards and legal requirements, many cross-functional teams may manage and measure their engagement in this dynamic digital age.

**“Social media metrics in and of themselves don’t mean much unless they tie back to some sort of business action or business outcome.”**

— Brian Snyder

### Key takeaways:

- **Social media measurement is important, but challenging. There are no common best practices, and measurement metrics are evolving with social media itself.**
- **Common metrics can include page-view increases or click-throughs, and conversation share.**
- **Businesses should spend time first clearly defining their goals for a social media campaign and the desired ROI.**



**Steve Rubel**

Director of Insights,  
Edelman Digital



**Peter Spande**

VP Sales,  
Federated Media



**David Weinberger**

Author, Blogger  
and Fellow,  
Harvard Berkman  
Center for Internet  
& Society



**Derek Creevey**

**Moderator**

Chief of Staff,  
Edelman

## What's Next?

As social media changes at a rapid-fire pace, predicting “what’s next” is challenging. In fact, according to the panel, getting social media predictions right 30 percent of the time is a good achievement.

Nevertheless, there were a few common themes and key takeaways that emerged from the discussion and the two-day Summit:

- **Traditional boundaries will continue to shift.**

David Weinberger contrasted word-of-mouth marketing (WOM) with Richard Edelman’s vision of Public Engagement. WOM is a technique for one-way messaging that uses social media as a medium. With public engagement, on the other hand, participants must be ready to listen and change behavior. The result of engagement is unpredictable; the very act of engagement can prompt an unexpected outcome.

- **Be ready to lose control.** With boundaries being eliminated, control of messaging has been washed away along with a single voice of authority. The relative clarity of the past will be replaced by messiness, and we must get used to the new paradigm.

- **New business models will evolve.** Businesses will evolve along with social media itself. Peter Spande described how Federated Media has done this by following a guiding theory that every marketer is a publisher, and every publisher is also a marketer.

- **Embrace the “social” part of technology.** Steve Rubel urged the audience to recognize that we are, and have been, social creatures in our lives long before the arrival of digital technology. So we must avoid thinking of social media as a “thing” or a frightening new phenomenon — it’s really just an extension of who we are.

**“The next great social network is going to be the Web... meaning that every single Web site in the coming decade will have some sort of social functionality to it... and those that don’t are going to be at a disadvantage.”**

— Steve Rubel



Host: Phil Gomes  
Senior Vice President,  
Digital Integration,  
Edelman

## Social Media Immersion Workshop

### The Pros and Profs: Building the Future Communications Workforce

#### The Assignment:

Produce a Live Call-in Show on BlogTalk Radio (Hear the result at <http://tinyurl.com/nmas> 2009.)

This workshop demonstrated a simple message that participating professors – many of them new to social media tools and online community mores – took back to their students: New media tools are easy to learn – but knowing when and how to use them requires nuance and focus.

I receive countless resumes, speak to students often, and participate regularly on the PROpenMic.Org network. Thus, it's clear to me that general communications curricula do not fully integrate new media principles and technologies to the degree that many PR firms increasingly demand.

This is not an indictment of academia. There are numerous pressures – political, administrative, financial – that prevent communications curricula from keeping up with the pace of change, not the least of which is the fact that we are undergoing an evolutionary change in media. Fortunately, there are many professors, programs, and resources that are leading on the social media front. Here is some insight into the challenges students and teachers face in the new media realm and how they are moving forward.

“The challenges for students are numerous. First and foremost is rethinking the use of social media from staying in touch with friends to developing and sustaining relationships for clients. This requires a major mind-shift. Along with this mind-shift is a completely revised perspective of the media itself – not as a fun way to stay in touch, but an extremely important platform for assisting clients. As for educators, it means moving from any previous perspective that social media is frivolous and a time-waster for kids to a powerful new tool for practitioners.”

— Gail D. Love, Ph.D.  
Associate Professor; Director, Public Relations Concentration  
Communications Department  
California State University-Fullerton

“Critical thinking and strategic editing are crucial. As educators, we've got to figure how to balance all the demands to be “friends,” to “tweet,” to be “linked” and a multitude of others while providing the substance that's so necessary.”

— Dr. Barbara B. Hines  
President, Association for Education in Journalism and Mass  
Communication, 2008-09; Director, Graduate Program in Mass  
Communication and Media Studies  
Howard University Department of Journalism

“Students and professors who are rapid adapters of the technology and concepts of digital media are leapfrogging those who aren't. It may take a while to establish a good research base for teaching about new media, but our Twitter Research Group at Wichita State has been having an interesting time applying established theories – to this emerging world.”

— Lou Heldman  
Distinguished Senior Fellow, Media Management and Journalism  
Elliott School of Communication  
Wichita State University

“This is a major curriculum challenge for media educators because change requires faculty buy-in and various levels of time-consuming approvals. So, we are not exactly a “just-in-time” environment. On the positive side, this gives us some time to avoid costly errors by jumping into empty pools.”

— Jeremy Harris Lipschultz, Ph.D.  
School of Communication Professor & Director  
College of Communication, Fine Arts and Media  
University of Nebraska at Omaha

#### Key takeaways:

- We're in the biggest fundamental change in media since the advent of the printing press.
- Academia needs to better adapt to the media changes today to help develop the communications workforce of tomorrow.
- Social media tools aren't hard to learn. But knowing when and how to use them requires nuance and focus.



**Sree Sreenivasan**

Dean of Student Affairs and professor, Columbia University's Graduate School of Journalism



**Clarke L. Caywood**

Director of the Graduate Program in Public Relations, Medill Graduate School at Northwestern University



**Karen Russell**

Associate Professor, University of Georgia



**John Edelman**

**Moderator**

Managing Director, Global Human Resources, Edelman

## Teaching Social Media: What Skills Do Communicators Need?

During a roundtable lunch panel, professors of journalism, public relations and communications discussed the need to teach students a “convergence of skill sets” in an increasingly fragmented, digital media world. They agreed that students must hone their skills in storytelling across media formats; learn critical thinking and news literacy; and understand the strategies, not the tools, of using social media.

As news organizations are shutting down, cutting staff and moving content online, companies, non-profits and NGOs must fill the void by creating their own content, said Clarke L. Caywood of Northwestern University. This provides private and public sector organizations a big opportunity to tell their own stories directly to their audiences.

Sree Sreenivasan, a professor at Columbia University and also a freelance technology reporter, teaches what he calls “convergence journalism” — teaching journalists to work in multiple media formats such as print, TV, radio and online. He said students learn to tell stories well and connect with their audiences, but it's also critical that students learn news literacy — how to verify the truth of content they are reading or viewing.

Karen Russell of the University of Georgia asserted that more importance should be placed on principles, not just tools. For example, although students may be good at using social media tools (uploading a video to YouTube or updating their status on Facebook), they still need to learn how to apply them for public relations purposes.

Caywood concluded that as communicators learn a “convergence of skills,” there is a need for research to test the value of social media in broad and specific conditions. He challenged PR firms and academia to collaborate on projects to measure social media's impact and what strategies and techniques are most effective in specific situations.

## Additional related social media skill sets include:

- **Collaboration** — harnessing the collective intelligence of the Web, which grows in value with more user participation.
- **Ethics** — Model authentic, transparent and ethical social media use.

“Teach principles of social media, not tools.”

— Karen Russell

## Key takeaways:

- **Educators advocate teaching “convergence of skills” in our networked world:**
  - **Core skills:**
    - **Narrative or storytelling across media** — text, photo slide shows, audio and video
    - **Critical thinking or entrepreneurialism** — identifying a problem, taking a risk, offering a new solution
    - **News literacy** — knowing how to compare news content and determine which content is trustworthy
    - **Social media principles so students can understand how to apply specific tools to a broader purpose**

# List of Panel Participants and Sessions

## From PR to Public Engagement

Richard Edelman, Edelman

## The State of Media: Today and Tomorrow

Dan Gillmor, Arizona State University

David Kirkpatrick, Fortune

Nick Wrenn, CNN

Jim VandeHei, Politico

Shelby Coffey, Newseum

## Employee Engagement: Encouraging New Conversations

Jack Bergen, Alcoa, Inc.

Susan Bishop, General Electric

Jason Greenspan, McDonald's US

Gary Grates, Edelman

## Advancing Reputation: Every Organization is a Media Company

Mike Slaby, TomorrowVentures; formerly Chief Technology Officer, Obama for America; Technology Director, Presidential Transition Team

Debbie Curtis-Magley, UPS

David Liu, AOL

Nancy Ruscheinski, Edelman

## Crowdsurfing: Engaging Consumers

Alexandra Wheeler, Starbucks

Aaron Lily, Microsoft

Greg Matthews, Humana

Richard Brewer-Hay, eBay

Rick Murray, Edelman Digital

## The New Era in D.C.

Bob Shrum, Political Consultant (D)

Tony Blankley, Political Consultant (R)

Rob Rehg, Edelman

## Global Perspectives

Marshall Manson, Edelman

Michael Netzley, Singapore Management University

Wolfgang Luenenbuerger, Edelman

Michael Morley, Edelman

## Health: Using New Media in a Regulated Industry

Earl Whipple, AstraZeneca

Marc Monseu, Johnson & Johnson

Virginia Cox, Consumer Healthcare Products Association

Laura Gordon, Edelman

## Insights from the U.S. Administration about Engagement

Clay Johnson, Sunlight Labs (Sunlight Foundation); formerly Blue State Digital

David Almac, Edelman; formerly

Director Internet Operations, The White House

Mike Krempasky, Edelman

## NGOs: Advancing Issues

Dan Morrison, 1Well

Kira Marchanese, Environmental Defense Fund

Doug Ulman, The Lance Armstrong Foundation

Peter Segall, Edelman

## Measuring the Impact of Social Media

Brian Snyder, Senior Manager, Whirlpool

Lee Aase, Manager, Mayo Clinic

Marcel Lebrun, Radian6

Natasha Fogel, StrategyOne

## What's Next?

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